Contents

Security Role Request

This Request is for requesting security role access for Supervisory Organizations, Cost Centers, Grants and P-Card roles within Workday. Glossary for role assignments can be viewed in the Appendix.

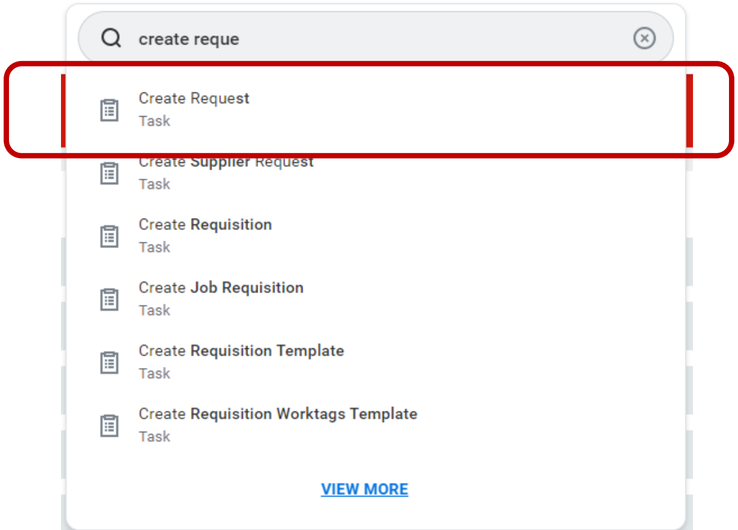
There are two new reports that can assist with Security analysis. The first is HR Security Roles that shows supervisory organizations with their security roles. This report can be run by Managers and Division Security approvers. The second report is Finance Security Roles that shows Cost Centers with their security roles. can be run by Cost Center Managers, Cost Center Analysts, and Division Security Approvers.

For Search Committee roles, please contact talent@montclair.edu.

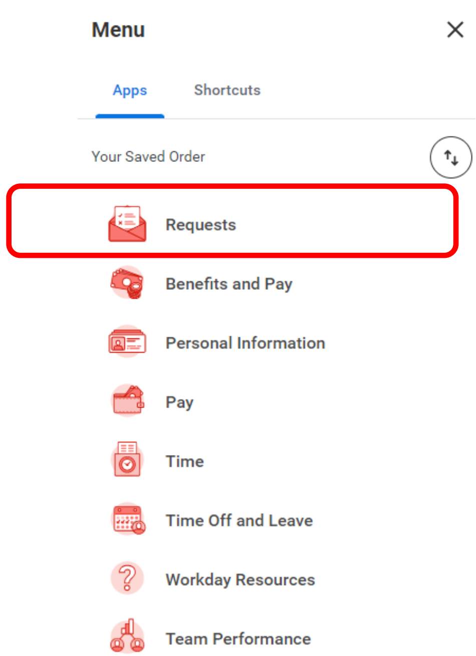
Any employee can initiate this Security Role Request. If you are submitting the Request on behalf of another employee enter the name of the employee in the *On Behalf Of* text box.

Create Request

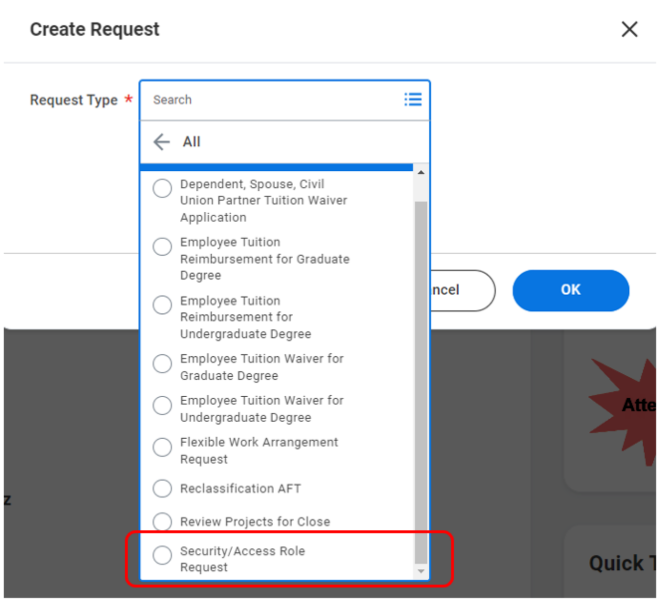
1) In the *Global Search* field, enter **Create Request**.

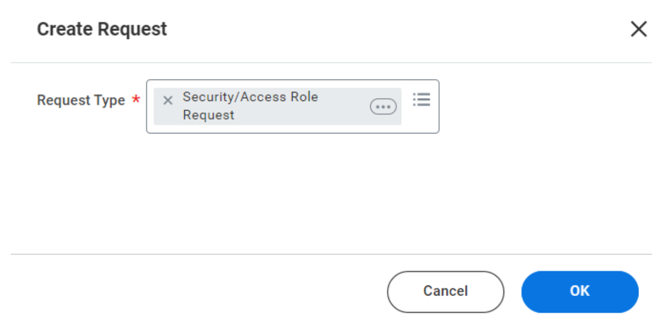


OR if you have the worklet added to your Apps tab on the Menu, click on the **Requests** worklet and click **Create Request.**



2) Click **All** in the Request type field and select the radio button next to **Security/Access Role** Request:





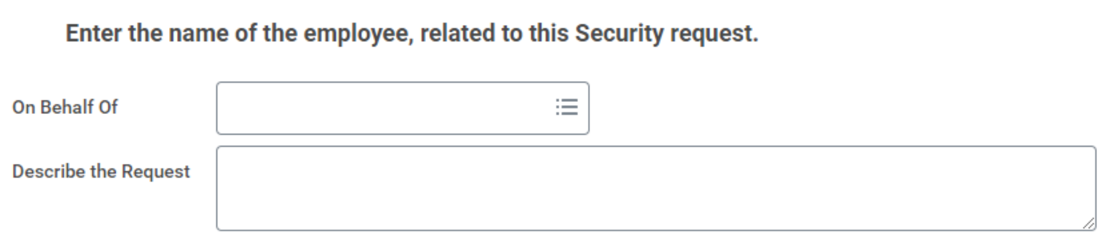
3) Click OK

Complete the questionnaire.

Please Note: The *On Behalf Of* field is for entering the employee related to this security request. If you are entering this request for yourself you do not have to enter your name in this field.

The (workflow) approval routing follows the approval routing of the initiator **unless** an employee is entered in the *On Behalf Of* field, in which case the routing (approvals) will follow those of the employee entered.

You may describe briefly what this request is about in the *Describe the Request* text box.



- If the employee has multiple position numbers, enter the position number applicable to this Security Role Request, if you know it.

If the employee has multiple position numbers enter the position number applicable for the requested role assignment:

- Enter the contact information – email or phone number;

  Contact Information: Phone number and/or email address

- <u>Supervisory Organization Name (HR related roles)</u> - Enter the full name of the permanent or temporary Supervisory Organization(s) associated with this role request. All roles selected will be assigned to (or removed from) all supervisory organizations entered.

  Temporary supervisory organizations always have the word "temporary" included in the name.

  Supervisory Organization Name (HR Related): Enter the full name of the permanent or temporary Supervisory Organization(s) associated with this role request. All roles selected will be assigned to (or removed from) all supervisory organizations entered.

  Temporary supervisory organizations always have the word "temporary" included in the name.

- Select from the dropdown any Supervisory Organization roles to **add**. This selection will be assigned to ALL Supervisory Organizations if more than one is listed in the box above.

  Select Supervisory Organization roles to **add.**

  Search

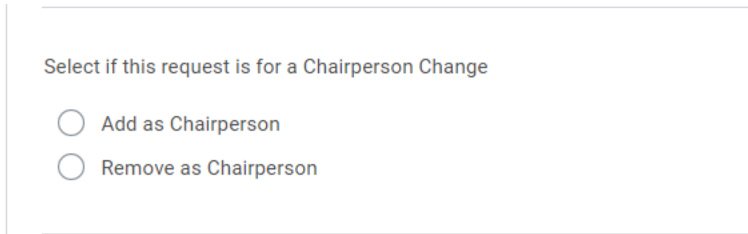
  - [ ] Administrative Assistant
  - [ ] Unit Head, only one per organization
  - [ ] Manager, only oner per organization
  - [ ] Timekeeper

- Select from the dropdown the Supervisory Organization roles to **remove**. This selection will be assigned to ALL Supervisory Organizations if more than one is listed in the box above.

  - [ ] Administratvie Assistant
  - [ ] unit Head, only one per organization
  - [ ] Manager, only one per organization
  - [ ] Timekeeper

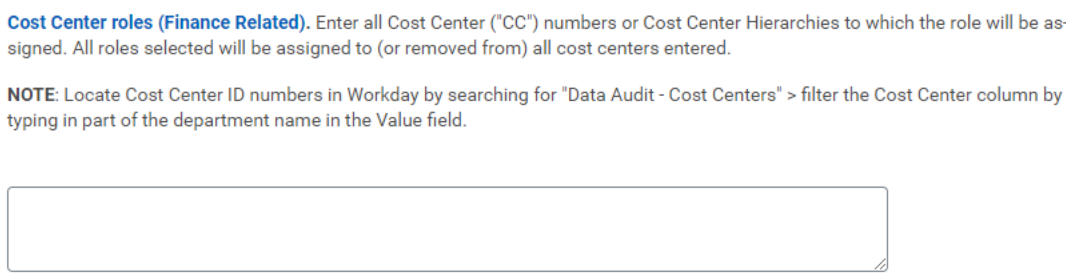
  Search

- If this Request is for a Departmental Chair change, select the option for Human Resources to change the title and move the employee to the correct supervisory organization.



- Cost Center roles (Finance Related Roles). Enter all Cost Center ("CC") numbers or Cost Center Hierarchies to which the role/s will be assigned. All roles selected will be assigned to (or removed from) all cost centers entered.

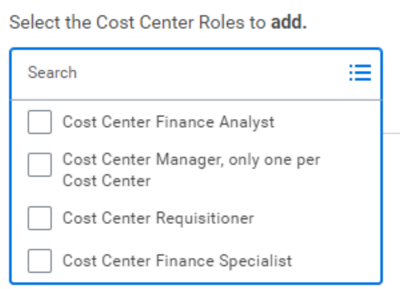
  NOTE: Locate Cost Center ID numbers in Workday by searching for "Data Audit - Cost Centers" > filter the Cost Center column by typing in part of the department name in the Value field.



Cost Center roles (Finance Related). Enter all Cost Center ("CC") numbers or Cost Center Hierarchies to which the role will be assigned. All roles selected will be assigned to (or removed from) all cost centers entered.

NOTE: Locate Cost Center ID numbers in Workday by searching for "Data Audit - Cost Centers" > filter the Cost Center column by typing in part of the department name in the Value field.

- Select from the dropdown the Cost Center Roles to **add (or** select Not Applicable). This selection will be assigned to ALL Cost Centers if more than one is listed in the box above.



- Select from the dropdown the Cost Center Roles to **remove (or** select Not Applicable). This selection will be assigned to ALL Cost Centers if more than one is listed in the box above

Select Cost Center role to **remove**.

Search

- [ ] Cost Center Finance Analyst
- [ ] Cost Center Manager, only one per Cost Center
- [ ] Cost Center Requisitioner
- [ ] Cost Center Finance Specialist

- Selecting a Grant Financial Analyst Role. Enter all grant ID numbers or the grant hierarchy/ies to which the grant role is to be assigned or removed.

Selecting a Grant Financial Analyst Role. Enter all grant ID numbers or the grant hierarchy/ies to which the grant role is to be assigned or removed.

For the Grant Financial Analyst role, select add oe remove:

- ( ) Add Grant Financial Analyst role
- ( ) Remove Grant Financial Analyst role

- Selecting a Gift Financial Analyst Role. Enter all gift ID numbers or the gift hierarchy/ies to which the gift role is to be assigned or removed.

Selecting a Gift Financial Analyst Role. Enter all gift ID numbers or the gift hierarchy/ies to which the gift role is to be assigned or removed.

For Gift Financial Analyst role, select to Add or Remove:

- ( ) Add Gift Financial Analyst role
- ( ) Remove Gift Financial Analyst role

- Selecting a Procurement Card (PCard) Approver Role. Enter all Cost Centers/ Cost Center Hierarchies to which the role is to be assigned or removed. **Only one PCard Approver can be assigned per Cost Center.**

NOTE: It is mandatory that PCard training be completed prior to requesting this

e. Questions about the P-Card Program or usage can be directed to

PCard Administrator in the Procurement Services Department, Natalie Mensah at mensahn@montclair.edu.

Section E: Procurement Card (PCard Approver Role). Enter all Cost Centers/ Cost Center Hierarchies to which the role is to be assigned. **Only one PCard Approver can be assigned per Cost Center.**

NOTE: It is mandatory that PCard training be completed prior to requesting this role. Questions about the P-Card Program or usage can be directed to the PCard Administrator in the Procurement Services Department, Elizabeth Blades at bladese@montclair.edu.

For Procurement Card Approver role, please select Add, Remove.

- ○ Add Procurement Card Approver role
- ○ Remove Procurement Card Approver role

- For Administrative Roles (Finance, Facilities, Human Resources or Information Technology): To copy roles assigned to an employee, please enter the name of the person (Worker) from which the roles should be copied. Indicate any roles not to be copied.

For Administrative Roles (Finance, Facilities, HR or Information Technology) : To copy roles assigned to an employee, please enter the name of the person (Worker) from which the roles should be copied. Indicate any roles not to be copied.

4) Click **Submit** to route the request for approval.

Submit | Save for Later | Cancel

5) If **Save for Later** is selected, the request will be located in the Inbox where it may be selected and completed at a future date.

×

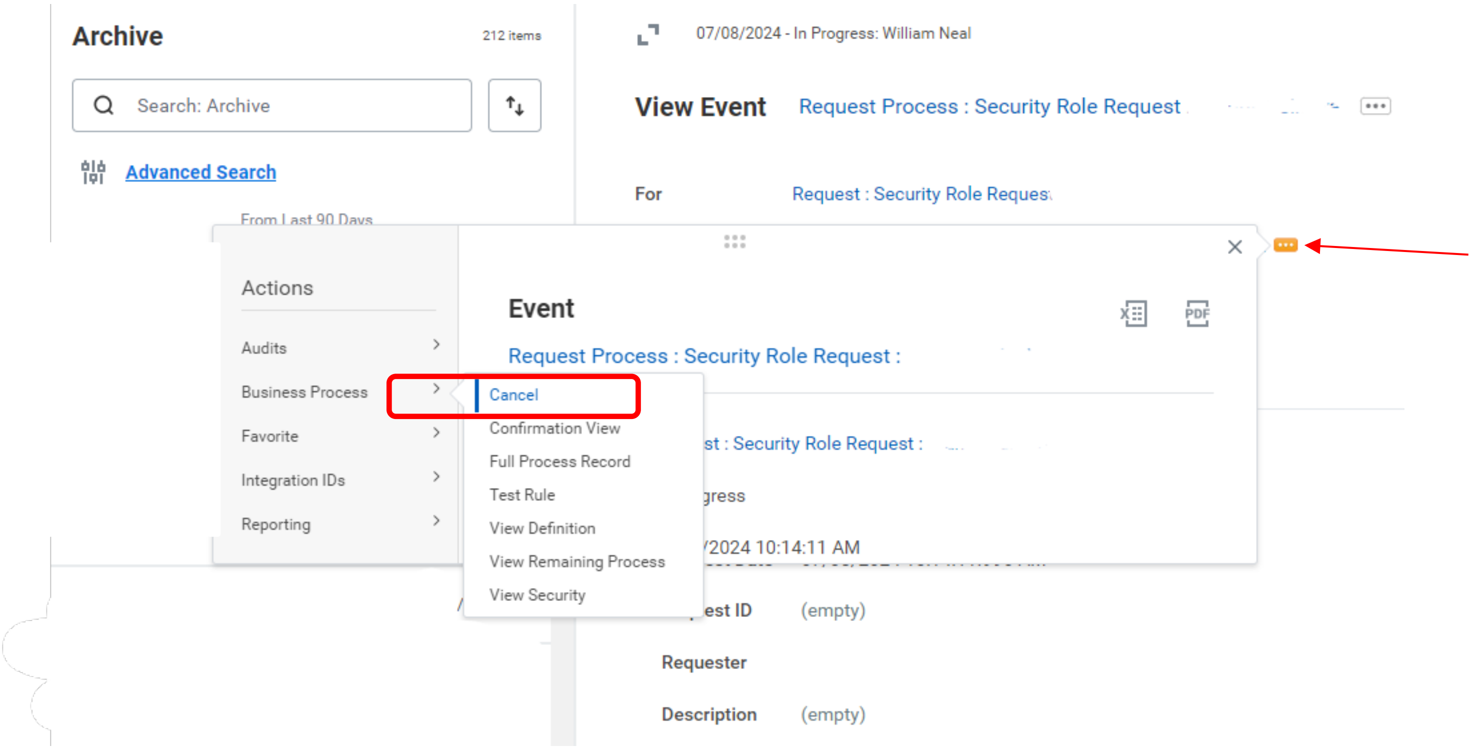
Event saved. Awaiting submission

Up Next: | Revise Request

View Details

Revise

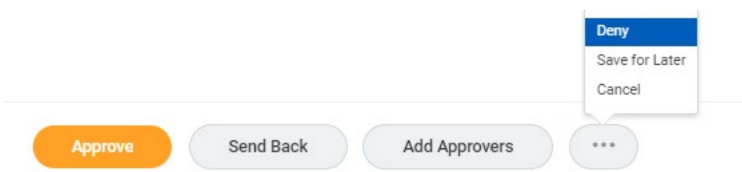
6) If there is a need to **Cancel** the Request. Find the request in your Archive. From the related actions (three dots) of the **Overall Process** of the Request select Cancel.



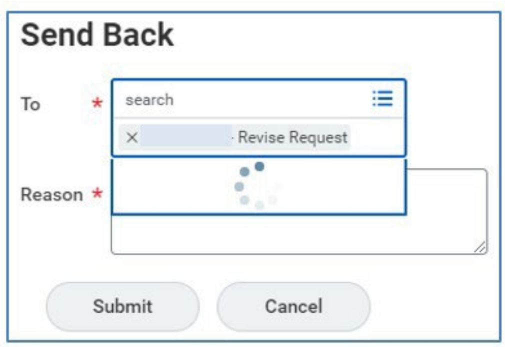
Approval Workflow

1) The Security Role Request will be sent to the Approver's Inbox. All requests for Supervisory or Cost Center roles are required to be approved by the employee's Manager, and the Division Security Approver. PCard Approver Role requests (add or remove) will be approved by the Procurement Card Manager as well as the employee's Manager. The Grant Financial Analyst Role will be approved by the Grants Specialist (Grants Accounting) as well as the employee's manager.
2) Review the questions and answers of the questionnaire. The Questionnaire is available to be viewed by the Approver and may be Sent Back or additional approval may be added using the Add Approvers button. This will result in the current step being approved before getting the additional approval. Any additional comments may be entered into the Comment box. All comments are retained on the business process for others to view.

- **Approve** to advance the questionnaire to the next step of the process,



- **Send Back** to the Initiator/Approver to revise the questionnaire,



- **Add Approvers** to show your approval but will not progress to the next step until additional approval is submitted.